

All corrections to notes on this calendar must be filed no later than 12 p.m. (noon) on 01/16/04. Documents filed after this time may not be reviewed before the hearing and will likely result in a continuance of your case.

#1

ST BERNARDINE MED CENTER

SCV 253601 Dennis J. Healy, Trustee (pro per)

**10th account & report of Trustee of Special Needs Trust; For Authority to Continue to Employ June Belan
account period: 6/1/02 – 5/31/03**

1. Need proof of service of mailing Notice of Hearing to all interested parties
2. Trustee requests administration to pay himself $\frac{3}{4}$ of 1% of the market value of the trust assets as per previous court orders. JTD
3. Trustee requests authorization to continue to employ June Belan
4. Trustee requests authorization to pay the Conservatee's mother \$315.00 per week for extensive physical therapy services to the Conservatee, who is disabled. JTD
5. Need financial statements verifying balances on hand. (Local Rule 908)
6. Need Order

If approved, set review date: 7/30/04. Accounting and/or status report must be filed 30 days in advance of hearing date

#2

BRUCE

SPR 54874 Nancy E. Hassard, Administrator

(Hartnell, Horspool & Fox)

Report on Status of Administration

1. Administrator requests authorization to make preliminary distributions in the sum of \$90,000, to be distributed to three beneficiaries each of \$30,000. JTD
2. Administrator requests authorization to pay her attorneys the sum of \$1,215.00 for X/O fees. (5.4/hrs. @ #225/hr) JTD
3. Administrator requests authorization to continue to make periodic monthly compensation payments in the amount of \$1,500. JTD
4. Need receipts re preliminary distributions from David Bruce, Donald Bruce & Nancy Hassard
5. Administrator requests administration to continue for a period of one year. JTD
6. POH: \$5,898,809.81

If approved, set review date: _____ Accounting and/or status report must be filed
30 days in advance of hearing date

#3

MCGOVERN

SPA 4936 Public Administrator (P. Savage (IV))

Accounting review

1. Court ordered status report to be filed on or before 12/26/03 if estate cannot be closed.
2. Need status

#4

CHAVEZ

SPR 05690 Maria Guadalupe Galindo Soto, Petitioner (pro per)

Petition to Determine Succession

1. Need verified supplement setting forth sufficient facts which would allow the court to make a determination as to whether the real property was community property of both spouses or the separate property of the decedent.
2. Need copy of Deed
3. Need verified supplement as to the relationship of Hugo Soto & Elizabeth Soto to the decedent
4. Need proof of mailing notice of hearing on all parties listed in #14

#5

MIRANDA, JR

SPR 05689 Margarita Carpio, Petitioner

(pro per)

Petition to Determine Succession

1. Appears real property to be in the name of Marguerite Joe Carpio & Victor Carlos Miranda, as tenants in common, both of whom are still living; Recommend court deny petition

#6

DELGADO

SPR 05688 Mary Lou Barajas, proposed executor (J. Dunn)

Petition for Probate of Lost Will with full IAEA and no bond

1. ~~Need proof of publication~~
2. Need clarification as to Article Second in decedent's will; will lists only 6 children, decedent states she has 11 children; Need verified supplement;
3. Need declarations submitted by Rosa Sanchez and Xavier C. Lopez, signed under penalty of perjury; stating the circumstances surrounding the lost originals; See PC§8223 & PC§ 6124
4. Question as to why Order was submitted with a copy of the decedent's Will attached. Section 2©2 does not require an attachment.

#7

CONZALES

SPR 05686 Piedad Gonzales, Petitioner

(Hartnell, Horspool & Fox)

Spousal Property Petition

Recommended for Approval

#8

BACHMAN

SPR 05685 Kathleen Bachman, Petitioner

(M. Daniel Saylor)

Petition to Determine Succession

1. Need proof of mailing notice of hearing
2. Subject to #1, Recommended for Approval

#9

FARMER

SPR 05684 John Edward Farmer, Petitioner (S. Stirling)

Petition for Order Authorizing Particular Transaction PC§3101

1. Need POS of Citation on spouse
2. Petition does not contain all allegations required (PC§ 3121 for required allegations).
Need verified supplement
3. Once notes are cleared, set for evidentiary hearing

#10

SANCHEZ

SPR 05683 Josephine M. Zanone, Special Admin. (T. Dominick)

Petition for Letters of Administration With Full Authority Under IAEA

1. Set bond at: \$ 100,000

Recommended for Approval

If approved, set review date: 3/25/05. Accounting and/or status report must be filed 30 days in advance of hearing date

#11

ECKENBERG

SPR 05682 Tom Sitton, Special Admin.

(J. Church)

Petition for Letters of Administration With Full Authority Under IAEA

1. Need proof of publication
2. Subject to #1, Recommended for Approval

If approved, set review date: 3/25/05. Accounting and/or status report must be filed 30 days in advance of hearing date

#12

CARLSON LIVING TRUST

SPR 05681 Gene Francis Carlson, Petitioner/Succ Trustee (E. Fischel)

Petition To Authorize and Instruct Trustee to Distribute Trust

1. All notices have been given
2. Set for evidentiary hearing on construction of trust and ascertaining beneficiaries

#13

YBARRA

SPR 05677 Juanita Ybarra, Petitioner

(J. Church)

Petition to Determine Succession

1. Need POS of mailing notice of hearing on all parties listed in #14
2. Appears there are several bequests in decedent's will of real property; Need verified supplement as to their disposition;
3. Need copy of deed re property in question
4. Need Order to be submitted

#14

DANIEL, JR

SPR 05667 Sara Daniel, & Sara Daniel, Conservator for Eric Daniel (J. Church)

Petition to Determine Succession

1. Need copy of Letters of Conservatorship for Eric Daniel for estate and person
2. Decedent only had an undivided ½ interest in the real property; **need copy of deed** in order for court to make the determination that the property passing to the petitioners is conclusive on all persons.

#15
MEES
SPR 05655

**Petition to Establish Testamentary Trust, Appoint Trustee of Trust & Authority to
Make Monthly Payments to Mother of Minor**

No file available

#16
LANIER
SPR 05644

Petition for Letters of Administration With Full Authority Under IAEA

No file available

#17

ZARICH

SPR 05436 Vicki E. Benton, Administrator

(E. Kempe-Olinger)

1st & final account & report & petition for fees

1. Administrator waives compensation
2. Statutory attorney fees requested of \$4,450.00 OK
3. Absent objections, Recommended for Approval

set review hearing re filing final discharge & receipts: 3/25/05.

#17A

RICH

SPR 05325 Doris M. Cottman, executor

(E. Kempe-Olinger)

1st & final account & report & petition for fees

1. Statutory fees & commission requested of \$5,699.80 OK
2. Attorney requests X/O fees of \$840.00 (4.2/hrs. @ \$200/hr.) JTD
3. Attorney Declaration received states funds of \$91,812.83 are being held in her attorney/Client Trust account; If estate is not closed within 30 days, monies are to be placed in a separate attorney/client trust account where the estate is receiving the benefit of the interest and not going to the state bar.

If approved, set review hearing re filing final discharge & receipts: 3/25/05.

#18

JEFFREY

SPR 05322 Donald Jeffrey, executor

(L. McLarman-Dugan)

1st & final account & report & petition for fees

1. Statutory fees & commissions requested of \$13,857.27. OK
2. No financial statements were filed with original inventory & appraisal – See Local Rule 908. Need copy of investment account statements verifying the balance of cash and/or securities on hand as of date of death.
3. Need copy of the following financial statements to verify funds on hand:
 - a) AARP GNMA & U.S. Treasury Fund
 - b) Proceeds of Sale of \$114,629.16
4. Need verified supplement setting forth allegation re disclosing any family affiliate relationship between the representative and any agent hired by the representative. See PC§ 1064(a);

If approved, set review hearing re filing final discharge & receipts: 3/25/05.

#19

LARA

SPR 05086	Anita Flores, Petitioner	(C. Troncoso)
	Alicia Martinez, Objector/dgtr	(pro per)
	Alfren Flores, Son	(D. DiMaggio)
	Aaron Flores, Son	(pro per)

Hearing re Status

Issue: Petition for Administration with full IAEA filed by Anita Flores

1. Need proof of publication filed before anyone can be appointed Administrator
2. Objections received; issue is forged signature
3. Need service on Conservator for Audrey Flores as she is in Patton State Hospital and represented by Public Guardian
4. Trial estimate ½ day; cannot set for trial until service and notes cleared
5. Need status

#20

JOHNSON

SPR 05028 Kathleen I. Johnson, Executor
California Public Utilities
Court Appointed Receiver

(Davert & Loe Lawyers)
(C. Lee)
(J. Richardson)

Hearing re Status

Continued from: 12/05/03

1. Attorney Lee to submit Stipulation and Order.
2. P&A's received from the PUC re suspension of executor's powers
3. Need status

#21

SCOTT

SPR 04995 Patricia L. Gilbreath, executor

(K. Albrektson)

1st & final report & petition for fees

1. Statutory fees & commissions requested of \$7,745.43. OK
2. Need verified supplement setting forth the summary of account ; waiver of account only waives the detailed schedules not statutorily required contents of report/account. Summary is statutorily required (Ca Rules of Court 7.550)
3. Need receipts for all specific bequests distributed pursuant to terms of trust Article Two A. 3,4,5,6,&7
4. Attachment 21, page 11 of final report lists interest from Prudential Financial and Lincoln Financial; however, neither one of these financial institutions were inventoried; need supplement inventory listing principal balances in these accounts at date of death and a supplement including those accounts.

If approved, set review hearing re filing final discharge & receipts: 3/25/05

#22 & 23

DOAN REVOCABLE TRUST

SPR 04984	Richard Beck, Petitioner/Beneficiary	(R. Walker)
	Linda Beck, Trustee	(pro per)
	Shelly Beck & Laura Beck-Martinez, bene	(pro per)

Hearing re status report

1. Need proof of service of mailing notice of hearing re status report
2. Need Order re Status Report
3. See related matter #23

#23

DOAN REVOCABLE TRUST

SPR 04984	Richard Beck, Petitioner/Beneficiary	(R. Walker)
	Linda Beck, Trustee	(pro per)
	Shelly Beck & Laura Beck-Martinez, bene	(pro per)

Hearing re OSC re sanctions and status

Court ordered the accounting filed no later than 12/5/03

Prior Notes:

1. Trustee claims that certain assets are in joint tenancy; court ordered her to account for all assets regardless of how title is held.
2. Need status - Agreement reached – in process of finalizing

Trustee Accounting of Linda S. Beck

1. Account must cover the time frame from 7/1/01 to present; petition fails to state account period; need verified supplement
2. Need itemized schedule of income on all assets regardless of how title was held from 7/1/01 to present;
3. Need itemized schedule of disbursements from 7/1/01 to present;
4. Question whether 1984 motor home is registered and if so to whom; need copy of registration and insurance on motor home; question whether monochrome has been used since death of Kenneth Doan and if so, by whom and duration of use;
5. Need schedule of property on hand at beginning and end of accounting; need promissory notes set out in detail (Amount of note, maker, and date of note, interest rate and balance owing) need allegation whether unsecured or secured note; Coin collection must be itemized as to coins.

#24

JONSON

SPR 04982 Charles Wessman, Administrator

(E. Kempe-Olinger)

Report of Status of Administration

1. Notice of Hearing did not contain mandatory language; see PC§ 12201(b)).
2. Recommend court continue hearing in order for all parties to be re-noticed;

#25

LAYVAS

SPR 04915 Richard Solano, Executor

(Hartnell, Horspool & Fox)

2nd report & Waiver of account

1. Statutory fees & commissions requested of \$1,084.00. OK
2. Absent objections, Recommended for Approval

set review hearing re filing final discharge & receipts: 3/25/05

#25A

PUMMEL

SPR 04793 Department of Developmental Services, Petitioner (J. Kim)
Gerald Pummel, Administrator (R. Rosengarten)

Petition for Payment of Cost of Care filed by Dept of Developmental Services

1. ~~Need proof of service of mailing notice of hearing on all interested parties.~~
2. This estate has no assets at this time; there is a Conservatorship that is pending and upon the closure of that estate, all assets will be ordered distributed to the probate estate, at which time a hearing can be held if the creditor's claim of the department is rejected..
3. The above petition is based upon a debt owed the Department during the lifetime of the Conservatee; this petition should have been brought during the lifetime of the Conservatee. All of the code sections referred to in the petition relate to Conservatorship proceedings which cannot be heard in a probate estate.
4. Probate court does not have authority to hear this matter; however, once the estate is funded with proceeds from the Conservatorship estate, if the claim is rejected by the administrator then the Department may file a petition on rejected creditor's claim for this court to hear and consider.
5. Written objections have been filed by Gerald Pummel, Administrator

#26

PELEGRIN

SPR 04563 Thomas M. Jones, Executor

Final account & report & petition for fees

No file available

#27

DARBY

SPR 04416 Minnie E. Darby, Administrator
Karen Husted, daughter

(W. Ward)
(T. Dominick)

1st account & report & petition for preliminary distribution and for bond reduction

1. Partial statutory fees & commissions were approved per minute order dated 8/9/02 of \$6,000 each;
2. Summary of Account is not in proper format and does not balance; Need verified supplement setting forth revised summary of account; Prob C §1061(b)
3. Need verified supplement as to the following issues:
 - Need property on hand schedule listing property at end of accounting and market value per Prob C §1063
 - Need date of birth on Beverly Robinson and Lisa Craig
 - Need copies of invoices/statements on all distributions for repairs made to relatives of the personal representative.
 - Estate has been open since July 2001 need further information as to why the tax returns have not been completed; question whether personal representative has hired outside firm to handle and whether returns have been filed and waiting for audit; court to consider sanctions for failure to file returns and close estate absent good cause.
 - Expenditures made on 2020 & 2023 Mallory; neither of these properties have been inventoried; need properties inventoried; **also need final inventory**

4. Need proof of service of mailing notice of hearing on all interested parties, including notice to Thomas W. Dominick, on behalf of Karen Husted, Request for Special Notice
5. Need copies of financial statements to verify cash on hand in the sum of \$370,262.74.
6. Petitioner is requesting this court make a determination that the step-children of the decedent are entitled to inherit under Prob C 6454; this issue will need to be set for an evidentiary hearing
7. Petitioner requests reduction of bond after preliminary distribution is made; court to review after complete accounting is provided.
8. Petitioner is requesting a distribution of the decedent's community interest to his spouse and \$105,000 divided between the spouse and children (including stepchildren); petitioner has failed to provide this court with an estimate of the **NET** value of the estate after taking into account any and all income tax ramifications.

#28

PAULSON

SPR 03835 Lynn Starmann, Admin. CTA
Susanne Horton/Objector

(T. Dominick)
(Mrich & Assoc.)

Hearing re status/accounting

Continued from: 8/15/03

1. Appeal pending in Orange County.
2. Need status

#29

STOTT

SPR 03227 Robert L. Valley and Mary Valley, Petitioners/Co-Admin. (J. Altman)
Louise Valley, Heir/Objector (W. Ward)
Robert Krasney Former Atty for Administrators

Hearing re Status

1. Matter taken under submission;
2. Ruling as follows:
 - a. request for surcharge of \$10, 469.03 against Louisa Valley's share of the estate is denied;
 - b. Co-administrators fees of \$19,801.05 approved
 - c. Prorata share of statutory attorney's \$5,000.00 by Robert A. Krasney, approved
 - d. Prorata share of Extraordinary fees of \$500.00 by Robert A. Krasney, approved
 - e. Request for statutory fees and extraordinary fees in the amount of \$80,132.30 and costs in the amount of \$593.80 is approved and ordered that the \$5,500 awarded to Robert A. Krasney be deducted there from;
 - f. Counsel for co-administrators to prepare the Order with approval as to form and content to be given by William J. Ward and Robert Krasney;
2. Need order to be submitted

#30 & 31

BLOOM

SC 02552 Randi L. Guerrero, Temp conservator/ dgtr (E. Fischel)

Petition for Appointment of Conservator of Person Only

Temporary Letters Issued: 12/23/03

1. Need CI report
2. Recommend court appoint counsel for Conservatee - dementia powers requested
3. Court has read and considered Clets as to Randi L. Guerrero

#31

BLOOM

SC 02552 Randi L. Guerrero, Temp conservator/ dgtr (E. Fischel)

Petition for Exclusive Authority to Give Consent to Medical

1. Need proof of mailing notice of hearing as to Petition for Authority to Give Consent to Medical;
2. Recommend court appoint counsel for Conservatee - dementia powers requested

#32

TORRES

SC 02547 Valerie Perez, Temp conservator /estate only/dgtr (K. Walker)
Attorney for Conservatee (K. Horspool)

Petition for Appointment of Conservator of Estate Only
Temporary Letters Issued: 12/17/03

1. CI report received; Objections made; Conservatee is able to complete Affidavit Voter Registration
2. Need report from court appointed counsel for Conservatee
3. Set bond at: \$ 38,000
4. Clerts report has been received on Valerie Perez - OK

#32A

HERMAN

SC 02542 Mary Lynn Clark, IRC, Tem Conservator (R. Abraham)
Attorney for proposed Conservatee (J. Runyan)

Petition for Appointment of Limited Conservator

Temporary Letters Issued: 11/25/03

Continued from: 1/2/04

1. ~~Need proof of service of Citation~~
2. All funds to be placed into a Special Needs Trust managed by Inland Counties Master Trust
3. Received Court Investigator Report – Judge to review
4. Need report from court appointed counsel.

If approved, set review date: 3/25/05. Accounting and/or status report must be filed 30 days in advance of hearing date

#33

FIRTH

SC 02512 David Bruce Firth, Temp Conservator/son
Attorney for Conservatee

(Jeni Brent)
(M. Friedland)

Petition for Appointment of Conservator

Temporary Letters Issued: 10/27/03

Continued from: 12/05/03

1. CI report rec'd - Conservatee objects
2. Need report from court appointed counsel
3. ~~Need medical capacity declaration~~
4. Court has read and considered the Clerts report on petitioner.

If approved, set review date: 3/25/05. Accounting and/or status report must be filed 30 days in advance of hearing date

#34

SMITH

SC 02492	Carl Smith, Petitioner/Friend	(Hartnell Horspool & Fox)
	Laura Smith, Daughter/Objector	(pro per)
	Attorney for proposed Conservatee	(D. Booth)

Petition for Appointment of Conservator

Temporary Letters Issued: 9/18/03

Continued from: 10/17/03 - for daughter to obtain an attorney

1. Need notice to both sons of proposed Conservatee
2. CI report indicates Conservatee wants to discuss matters with her daughter, Laura
3. No due diligence filed as to reason children of proposed Conservatee cannot be located. Son & daughter would have priority over non related petitioner
4. CII report received on petitioner – ok
5. No objections filed as of this date

#35
PRESTI
SC 02310

No file available

#36

TOMPKINS

SC 02259 Amelia Sewell, conservator/Temp Succ Trustee(Hartnell, Horspool & Fox)
Daniel D. Tompkins, Succ. Trustee (pro per) suspended

Petition for Removal of Trustee and Appointing Succ Trustee

1. Need proof of service of mailing notice of hearing
2. Recommend court appoint court appointed counsel for Conservatee
3. Ex Parte Petition for Order Suspending Powers of Trustee and appointing Temporary Successor Trustee granted

#37

OLIVE

SC 01095 Bertha Clavelo Olive, Petitioner/ Mother (pro per)
Public Guardian, Guardian of Person & Estate (County Counsel)

Petition for Appointment of Conservator
Continued from: 12/05/03 – no appearance

1. This should be a petition for appointment of Successor Conservator as Public Guardian is the present Conservator
2. Court Investigator Report received - judge to review
3. Need proof of mailing of Notice of Hearing on: Public Guardian, Susan Sanchez (sister)
4. ~~Need doctor's declaration re inability to attend and capacity declaration~~
5. Need Attorney Appointed for Conservatee

#38 & 39

THORNTON

SC 00500 Michael G. Laudeman, prop.Succ. Conservator(Hartnell, Horspool & Fox)
Ruth L. Hendricks, Tem Succ. Conservator(Hartnell, Horspool & Fox)
Jennifer French, conservator (Hartnell, Horspool & Fox)
Attorney for Conservatee (M. Friedland)

Amended Petition for Appointment of Successor Conservator/

Temporary Letters Issued: 10/30/03

Continued from: 12/05/03

1. ~~Need proof of service of mailing notice of hearing on all interested parties. See PC §§2683 & 1460;~~
2. Upon appointment of successor conservator, Jennifer French is to file her 4th accounting within 90 days;
3. Set bond at: \$ 30,000;
4. Need report from court appointed counsel for Conservatee
5. Clerts report received as to Michael Laudeman. OK
6. see related matter # 39

#39

THORNTON

SC 00500 Michael G. Laudeman, prop.Succ. Conservator(Hartnell, Horspool & Fox)
Ruth L. Hendricks, Tem Succ. Conservator(Hartnell, Horspool & Fox)
Jennifer French, conservator (Hartnell, Horspool & Fox)
Attorney for Conservatee (M. Friedland)

Hearing re OSC re Removal of Conservator /Monetary Sanctions

Continued from: 10/24/03

1. Need report from court appointed counsel
2. 4th accounting is due. Nothing filed.

#40

BUTLER

SC 02217 Inland County Regional Center, Inc., Conservatee, Ltd. (R. Abraham)

Report on Status of LTD Conservatorship Proceeding and Petition to Dispense with Requirement of Payment of CI's Assessment Due to Hardship PC§2628. 1851.5)

1. Notice has been given
2. Petitioner requests waiver of CI fee due to lack of assets at this time, however, Conservatee will be receiving funds in the near future (no amount given). Recommend reserve on issue of waiver of fees until accounting has been filed.
3. Continue administration for six months to 6/25/04.

#41

SLONEKER

SC 02011	02011	Melodie Z. Scott, Tem Succ Conservator	(S. Kastilahn)
		Kenneth Font, Former Conservator	(E. Fischel)
		Attorney for Conservatee	(D. Diaz)
		Former Attorney for Conservatee	(C. L. Farrell)

Hearing re Status

No file available

#42 & 43

LONGO

SC 01962 James & Roberta Blackburn, Co-c'tors (Skoretz & Church)

1st Account -

Account period: 12/21/01-7/17/02 = 7 mos

Continued from: 7/11/03, 10/03/03, & 12/05/03

1. Accounting is out dated; need accounting from 12/21/01 to 12/20/02 (1 year)
2. Need further explanation of \$1,500 paid to James Blackburn for conservator fees; court has not ordered fees and there is no explanation as to what services James Blackburn provided.
3. POH does not list value of real property or automobile
4. Attorney requests fees of \$3,407.25; this time runs through 4/25/03 and is not for the period of the account; need revision
5. See related matter # 43

43

LONGO

SC 01962 James & Roberta Blackburn, Co-c'tors (Skoretz & Church)

**Petition for Substituted Judgment to Fund a Revocable Trust Agreement and
Execute a Pour-Over Will - PC§2580 (b)(5) & (13)**

1. Need proof of service of mailing notice of hearing on DSS
2. set for evidentiary hearing after accounting has been approved

#44, 45 & 46

ROMERO

SC 01960 Betty Romero Sarenana, conservator
Attorney for Conservatee

(pro per)
(M. Friedland)

1st account & report & petition for fees of Betty Romero Sarenana & petition for fees

account period: January 2002 to July 2003

1. Need proof of service of mailing notice of hearing on Conservatee & Veterans Administration (along with a copy of petition);
2. Need verified supplement as to the following issues:
 - No summary of account
 - No POH schedule
 - No inventory & appraisalment filed
 - Bank accounts appear to be joint with Conservatee, Betty R. Sarenana & Rosalinda R. Manchester, **not in the name of the Conservatorship** (this is grounds for removal) Bank account was to be blocked – no proof provided
 - Several disbursements questionable
3. See related matters # 45 & 46

45

ROMERO

SC 01960 Betty Romero Sarenana, conservator
Attorney for Conservatee

(pro per)
(M. Friedland)

Status hearing – Removal of Conservators /appointment of Successor

Continued from: numerous times

1. Stipulation & Order signed relieving joint conservator. Rosalinda Romero Manchester;
2. ~~Need to submit new letters~~
3. Need I&A
4. See related matters # 46 & 44

#46

ROMERO

SC 01960 Betty Romero Sarenana, conservator
Attorney for Conservatee

(pro per)
(M. Friedland)

Hearing re Proof of Blocked Account

1. Need proof of blocked account: \$16,000 in Bank of America
2. See related matters # 45 & 44

#47

DANIEL II

SC 01249 Ann Navarro, conservator
 Attorney for Conservatee

(pro per)
(L. Skoretz)

Hearing re Confirmation of Counsel

1. CI report rec'd - Conservatee wishes to terminate conservatorship/removal of conservator
2. Need report from court appointed counsel
3. Ex Parte hearing re confirmation of counsel 12/08/03 - Counsel has been ordered to appear or a citation will issue
4. Need inventory & appraisal - Letters issued 11/13/98
5. Accounting way overdue

#48

FORRESTER

SC 01214 Melodie Z. Scott, conservator

(M. Gill)

5th account & report & petition for fees

account period: 6/16/02 – 7/31/03

5th account & report & petition for fees & petition for fees

1. conservator requests fees of \$13,094.75 (275/hrs. @ \$48/hr.) Petitioner has received periodic payments of \$ 7,000 leaving an unpaid balance of \$6,094.75 - JTD
2. Attorney requests fees of \$3,685.00 (13.4/hrs. @\$275/hr.) - JTD
3. Conservator requests reduction of bond to \$700,000 - appears OK

If approved, set review date: 9/30/05. Accounting and/or status report must be filed 30 days in advance of hearing date

#49
CLIMIE
SPA 4932

Accounting review -

1. Need accounting

#50
BONIN
SPA 4865

**Accounting review, however, this should be: STATUS RE FILING OF
DISCHARGE - RECEIPTS**

1. Need receipts and/or final discharge order. Clerk noticed parties of today's hearing.

#51

GSOELL

SPR 04986 Monique A. Gsoell, Administrator (M. Keller)

Status re: Filing of Inventory
Filing of Accounting

1. Need inventory filed; Prob Code §8800(a) requires I&A to be filed within 4 mos from date of appointment (Administrator appointed 10/25/2002)
2. Need accounting; however, I&A must be filed first.
3. Recommend OSC re sanctions/removal for failure to file I&A

#52

TOMKINS

SPR 04954 Maria Tomkins, Executor

(D. Ferguson)

**Accounting and Inventory review hearing –
Continued from: 12/5/03**

1. Attorney stated that he was filing the Inventory on 12/5/03; **nothing filed**
2. Need inventory filed; Prob Code §8800(a) requires I&A to be filed within 4 mos from date of appointment (Letters issued 10/31/02)
3. Need accounting – **Need status of trust litigation – RPR01869**
4. Question whether this probate should have been consolidated with the trust litigation and why litigation is proceeding in Rancho if decedent lived in San Bernardino city.

#53
KIENAST
SPR 04942

No file available to review

#54

VAN LEUVEN

SPR 04890 Jo Ann Bond, Administrator

(A. Marshall)

Accounting review -

1. Off calendar; account filed and set for 2/6/04

#55

POWELL

SPR 04731 Martin Keller, Administrator

(pro per)

Accounting review -

Continued from: 9/5/03 & 12/5/03

1. Need status of filing final account and an amended I&A

#56

MANCO

SPR 04611 Claire D. Manco, Executor (M. Gunn)

Accounting review -

1. Order settling estate filed/signed on 10/25/02
2. **This hearing should have been set as a review hearing on Discharge/Receipts**
3. Need receipts and/or final discharge order. Clerk to notice parties of correct hearing if no one is present at today's hearing.

#57

THORNBURG

SPR 04335 Bradford T. Thornburgh, Executor

(Best Best Krieger...)

Accounting review -

1. Need accounting (Executor appointed on 5/22/01) closure of estate is overdue.

#58

CLARK

SPR 04123 Kathryn Clark, Executor (G. Wilson)

OSC re Accounting

1. Status report hearing of 1/17/03 continued estate Administration to 3/14/03; the accounting review hearings have been continued 4 times.
2. Need accounting or citation issued to Executor for removal/sanctions

#59

VANTILBURG TRUST

SPR 04041 Melodie Z Scott, Successor Trustee

(D. Horspool)

Hearing re Final Discharge –

Continued from: 12/5/03

1. Need receipts and/or final discharge order.

#60

MC DONALD

SPR 03664 Kenneth Jingles, Administrator

(M. Keller)

Accounting review -

Continued from: 9/19/03

1. Need accounting

#61

PICKERING

SPR 02544 Glenda Pickering, Administrator

(J. Morris)

**Hearing re Final Discharge –
Continued from: 10/24/03**

1. Attorney called on 10/24/03 and requested continuance to today's date;
2. Need receipts and/or final discharge order. Clerk noticed parties of today's hearing.

#62

BURRIS

SC 8728

Melodie Z Scott, Conservator

(D. Horspool)

Accounting review -

1. Need accounting from 11/7/2001 to 11/6/2003

#63

HALL

SC 02411

Simone, Petitioner

Linda Costello/Patricia Campbell, Co-C'tors

Attorney for Conservatee

(pro per)

(A. deBellefeuille)

(J. Runyan)

Motion to Vacate Judgment filed by Simone

1. Petitioner states he has known the Conservatee for several years; petitioner does not give any further explanation of "standing". Order signed on 10/24/03 was for Substituted Judgment to Create a Revocable Trust was brought by the co-conservators and approved by counsel for the Conservatee. Conservatee is now deceased. Argument presented appears to be for Louise V. Encalada, caregiver for decedent, who was purportedly a joint tenant on all of the Conservatee's accounts prior to the establishment of the trust. Per Attorney for Conservatee, the Conservatee instructed her to destroy his Will as he did not want to leave anything to Louise V. Encalada (former caregiver and girlfriend). Louise had received notice of hearing as to the substituted judgment. Petitioner, Simone, is the Attorney who prepared the Will that Judith Runyan was instructed to destroy.

2. Opposition to Motion filed by Co-Conservators

#64

MILLARD

SC 02071

Valinda Steine, Conservator

Attorney for Conservatee

Linda Foster, Objector

(C. Parker)

(R. Walker)

(D. Sweeney)

Status hearing re OSC re Removal of Conservator and Suspended Powers of Conservator

1. Attorney for Conservator had not been able to locate his client; the court **suspended the powers of Valinda Steine on 10/24/03.**
2. Need report from court appointed counsel and Attorney for Conservator
3. Question whether temporary successor Conservator needs to be appointed and whether notice of hearings has been given to all parties who have appeared in this matter.

#65

FURTADO

SC 01970 Dorma L. McCaslant, Conservator (K. Justice)

Accounting review -

Continued from: 12/5/03 at request of Attorney Justice

1. Letters issued 4/26/02; 1st accounting was due 4/25/03 and is now 9 mos overdue
2. Recommend set for OSC re removal/sanctions and re-appoint Sherrie Kastalahn as Attorney for Conservatee

#67

BILLDT

SC 01956 Michael A. Billdt, Conservator

(M. Keller)

Accounting review –

Continued from: numerous times; last continuance 10/24/03 at which time Attorney was advised there would be no further continuances

1. Need 1st account from 9/26/01 to present. 1st Accounting was due 1 year after appointment or 9/25/02.
2. The 1st accounting is overdue by 17 mos.
3. Recommend setting for OSC re removal and appointment of Attorney to represent the Conservatee

#68

MC WILLIAMS

SC 01606 Carol St. Jean, Conservator

(R. Abraham)

Hearing re Final Discharge

Continued from: 12/5/03

1. Order Settling 1st & Final Account of Conservator was heard and approved on 10/4/02 at which time the court order the present Conservator to turn all funds over to Earl F. Carter, as the personal representative of the deceased Conservatee's estate.
2. The deceased Conservatee's estate has been probated, SPR 04447, and on 4/18/03 and Order Settling 1st & Final Account was filed by the estate representative.
3. Question whether the probated estate contained the assets of the Conservatorship; if so, why has the Conservator had difficulty obtaining a Receipt from the personal representative.

2:00 p.m.

#69

KARALLES

SC 01936	E. Reid Karalles, Temp Succ. Conservator/Bro. (R. Abraham)	
	Melodie Z. Scott, former Temp Conservator	(Hartnell Horspool Fox)
	James D. Rice/Objector	(pro per)
	Kathleen N. Rice & James M. Rice	(Vega)
	M. Dee Elias	(K. Ford)
	Scott Smith	(R. Morris)

Settlement Conf/Trial Readiness Calendar

**Re: Petition for Verified Complaint for Relief Based on Breach of Contract,
Cancellation of Instrument, etc.**